



# sustainable now

**HOW BRANDS CAN PLAY A ROLE IN TURNING  
CONSUMERS' CLIMATE CHANGE GOALS INTO REALITY**



# Introduction

**We have reached a critical point in society's awareness of climate change and desire to do something about it.**

Described as 'the defining issue of our time' by the United Nations, with an impact that is global in scope and unprecedented in scale, people in the UK consider climate change to be of paramount importance, second only to the pandemic.

More than a third of British people now feel 'very concerned' about the impact climate change is having on the future sustainability of the planet.



## 8 in 10

agree that climate change is now considered to be everyone's problem.

But while awareness has increased dramatically over the last decade, along with active engagement and a desire to do something about it, only a minority of people say they are already taking significant action.



“

More important now than ever before, resources are running out, so we have to learn to reuse more and recycle all that we can.

People are concern rich but time poor. There is no doubting their appetite to make change, but the scale of the challenge, the abundance of information and the multiplicity of choice means people often falter at the point of action.

There is a key role for brands to play in helping consumers follow through on this positive - **people want to find out how they can be more sustainable in their life and choices** - so that they can turn good intent into action.

We explore three areas, in which brands are able to do this:



### Creating Urgency



### Bringing It Home



### Making It Easy





# Creating Urgency

**Creating urgency around sustainability helps drive consumers to action.**

Sustainability as a topic is vast and can be overwhelming, so it is paramount to break it down into smaller and more specific areas to make it more accessible and relevant to consumers.

**Communication, channels** and **content** play a huge role in engaging consumers with more digestible material, with each taking on different roles.

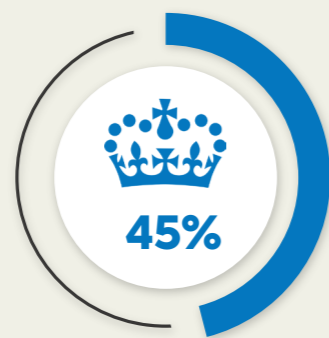


“  
We need action now to protect the future.”

## Communication

**The news is a primary vehicle for driving consumer awareness and emotional engagement around environmental issues.**

Our research found more than half of British people view the news as the most influential source on sustainability followed by government (45%) and family (45%).



The media's successful championing of the war on plastic is a prime example, resulting in the introduction of single use plastic bag charges, ban on plastic microbeads and initiatives against single use plastic in the UK.

It is no coincidence that 'plastic and waste' came top in our research as the environmental issue people feel most knowledgeable about. Zeroing in on one particular aspect of sustainability made it easier for consumers to digest and take action. As The Guardian noted in 2018: 'Unlike climate change, which seems vague, vast, and apocalyptic, plastic is smaller, more tangible.'

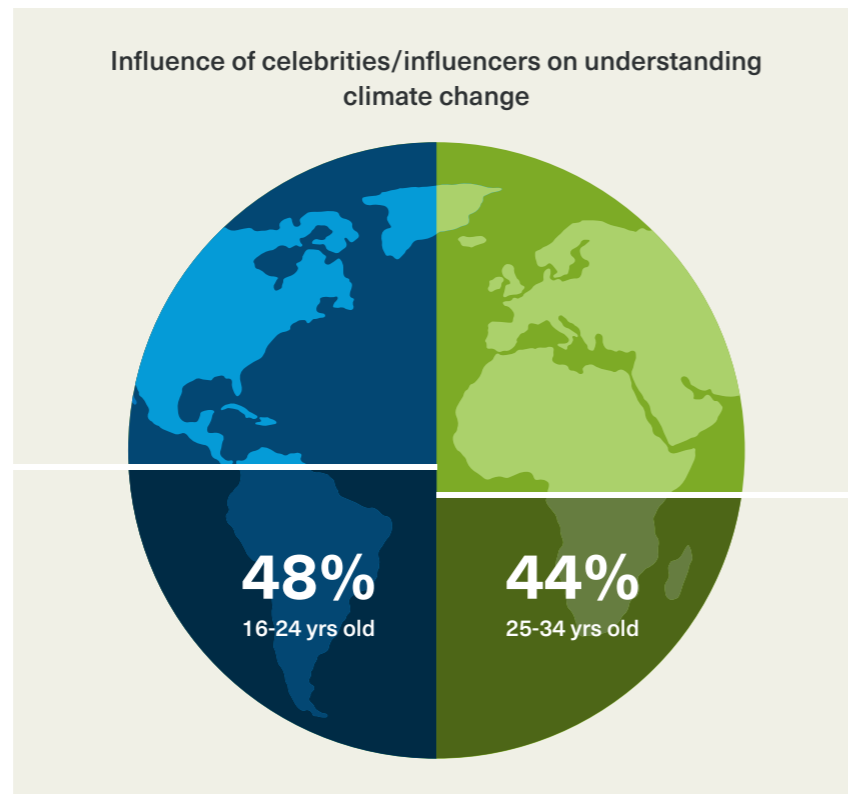
There has also been an explosion across the communications industry of joint initiatives highlighting the urgent need to address issues of sustainability, including Covering Climate Now, in which 400 media outlets joined forces to push sustainability further up the agenda.

An increasing number of media outlets have started to take more content that is sponsored by NGOs and foundations to help turn awareness into action, while The Guardian took the decision to use the language of 'climate emergency' rather than 'climate change'. A one word change, but potentially a world of difference.



# Channels

Alongside communication, channels play an important role. Social media for example (in particular celebrities/influencers) drives a broader breadth of topic awareness and specific product understanding/purchasing. Nearly a third of consumers believe celebrities/influencers are influential when it comes to understanding climate change, even higher amongst younger cohorts.



Platforms such as Facebook, Instagram and Twitter have become one of the foremost arenas in which to highlight the impact our consumption habits are having on the planet, such as photos of plastic-ridden rivers in Asia and videos of melting ice caps.

And no-one personified this more than Greta Thunberg, the climate change action champion who was able to bypass traditional media to bring her message to the masses.

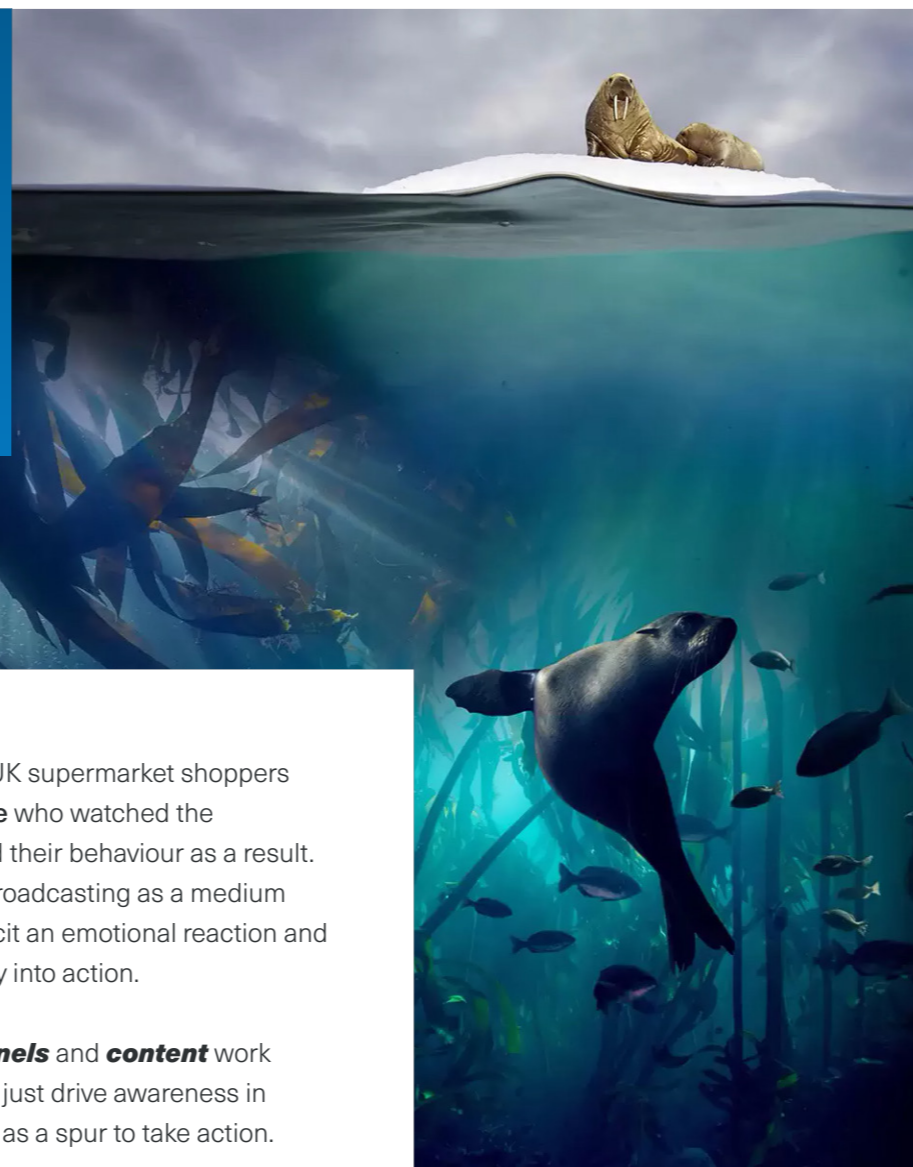
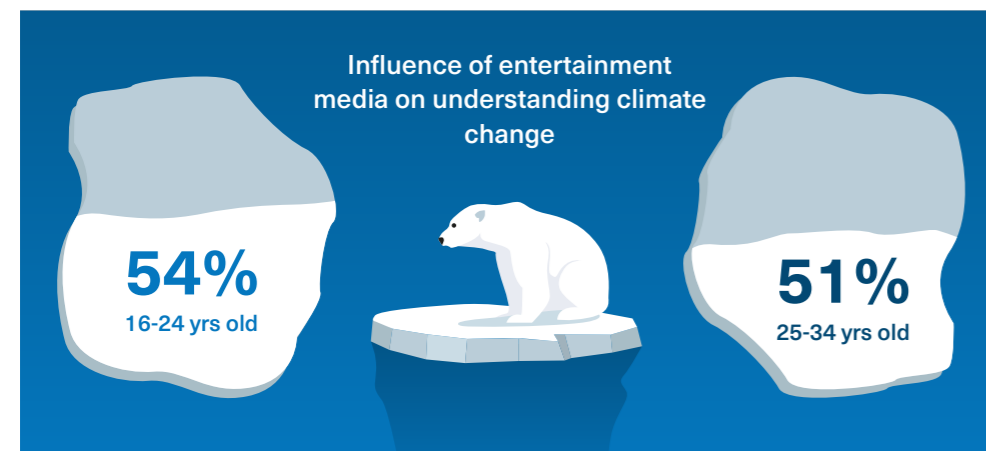
From veganism to the VSCO girl, social media is the forum in which individuals connect and share interests with their followers, including tips and information about how to live a more eco-friendly lifestyle.

Globally, 4 in 10 eco-consumers (those who say they try to buy organic/natural products and would pay more for eco-friendly products) say they mainly turn to social media for information about sustainable products and services, notably higher than the number who are checking out the actual brand/product's website.



## Content

The final element in driving the debate is content through entertainment media, providing depth to topics and both enlightening and potentially inspiring their audience. This is true particularly, amongst younger consumers who value this platform most in terms of its influence when it comes to understanding environmental matters.



A prime example of how content has driven understanding and built a connection with the audience was Sir David Attenborough's 2020 Netflix documentary 'A Life On Our Planet', a powerful first-hand account of humanity's impact on nature and a message of hope for future generations.

Shortly after the show became available on Netflix, Sir David joined Instagram and amassed 1 million followers in record time. He used the platform to share steps that we can all take to help tackle climate change and reduce our carbon footprint.

Sir David's BBC1 documentary series Blue Planet II was the most watched show of 2017 with 17 million viewers.

A subsequent survey of UK supermarket shoppers found that **88% of people** who watched the programme had changed their behaviour as a result. It was evidence of how broadcasting as a medium has massive power to elicit an emotional reaction and shake people from apathy into action.

**Communication, channels** and **content** work together to do more than just drive awareness in consumers, they also act as a spur to take action.

## Implications for brands:

1.

### Look inwards:

Understand the sustainability practices and commitments within your business is critical to identify a clear role and right to play. With greenwashing increasingly on consumers' radars, authenticity is critical - but so is humility. For many brands put off because they may not yet be truly 'green', being visible in the conversation can still be a relatable way to demonstrate commitments and take consumers on the journey with you.

2.

### Be mindful of the company you keep:

Be careful about the company you keep is a step all brands can take, regardless of existing sustainability practices and commitments. Beyond the big voices within the debate, there are opportunities for all brands to review communications through a sustainability lens. The Ad Net Zero initiative is one example of how the advertising industry is taking steps to encourage more sustainable practices behind the scenes with a commitment to reaching Net Zero by 2030. As part of this initiative, advertisers can understand more about the sustainability of their advertising practices from production to media buying: this is something all brands should be engaging with, regardless of what industry or sustainability commitments they have in place. Being visible in the conversation can still be a relatable way to demonstrate commitments and take consumers on the journey with you.

3.

### Commit to sustaining the conversation:

Those David Attenborough documentaries generated huge audiences and attention, but it's the brands that commit to maintaining the conversation beyond the headlines are those that will have the biggest impact. Brands should be thinking about how every consumer experience - be it social post, packaging or TV ad - can be viewed through a sustainability lens.





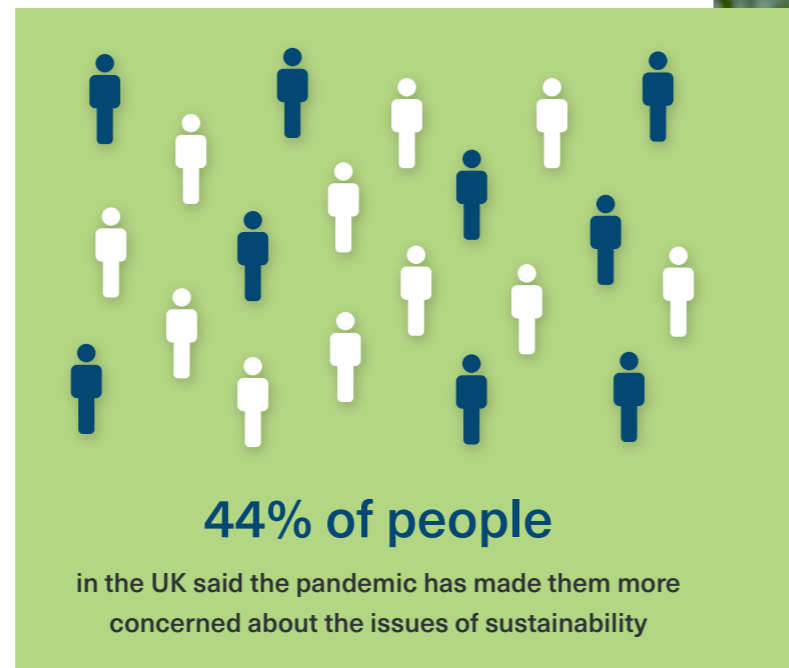
# Bringing it home

**Climate change has a tendency to fall down the national agenda at a time of big social or political stories such as Brexit.**

The topic of sustainability has traditionally been seen as too abstract or distant for many consumers to fully appreciate, or understand how to make a difference.

But Covid has had the opposite effect and served to put climate change front and centre of people's minds by highlighting on a more local and individual level the impact consumers are having on the world around us.

How? By spending more time at home we see for ourselves the amount of waste we create on a daily basis (and the subsequent need to recycle), making an invisible threat far more visible. And it has given us a taste of a world with cleaner air because of drastically reduced transport and fewer CO2 emissions.



than they were pre-pandemic, while globally 7 in 10 people said that sustainability is just as important as Covid in the long term.

Lockdown has given us a window into a different way of living, one in which 57% of Europeans (and 66% of women) give greater priority to nature and the importance of clean air.





Virgin and single-use plastics is one area where concern continues to grow, with the effects seen most obviously in the FMCG category. This is an area where consumers see retailers as taking the lead.

The big supermarket chains are where people will most often be confronted with the reality of their plastics use, whether in shampoo bottles, food packaging or carrier bags. And perhaps more so than usual as lockdowns have encouraged a return to the once-a-week or once-a-fortnight big shop.

The post-Covid world presents a huge opportunity to build on the momentum around sustainability. As the global economy starts to come back to life, there is the chance to build on and cement the growing awareness and behavioural changes that have started since the pandemic.

Not that this new world will be without its own unique challenges. Far from it. With healthcare workers and the general public staying safe with masks and gloves, the task of overcoming plastic pollution (an estimated monthly global consumption of 129 billion faces masks a month alone) will become even greater.

It will be key to keep the topic top of the agenda, not just through conversation and noise in the media but also by making it visible through the small moments where sustainability impacts on our day to day lives.



## Implications for brands:

1.

### Maintain momentum:

As routines and lives change again post-lockdown, reiterating a brand's sustainability credentials and commitments across packaging, owned touchpoints and within paid advertising is paramount. It may feel like 'hygiene' but it is an important part of driving wider visibility and normalising behaviours.

2.

### Think through the lens of the consumer:

With nearly half of our day accounted for by habit, focusing on the micro-moments of routine can unlock new opportunities to shift behavioural change. In a recent campaign to raise awareness of unsustainable practices within meat production, Greenpeace used audio and smart speakers to get closest to the point where consumers were cooking.

3.

### Harness the power of local:

With people giving more time and attention to their local area during the pandemic, there is an opportunity to think about how brands can be a part of these more emotive spaces and harness loss aversion as people return to old habits. This can be as simple as tying messaging to ecosystems or landscapes consumers feel closer to (the equivalent to 50% more trees in your local park), or reinforcing sustainable behaviours and introducing new products or services. For brands with a global footprint, this becomes even more powerful.





# Making it easy

Research has previously suggested that the responsibility for environmental issues has fallen on individual groups such as the Government.

However, there has been a shift in consumer perception.



It is a collaborative responsibility between brands, consumers and the Government.

When it comes to adopting a more sustainable lifestyle, people's interests and eagerness to adopt new practices is not always matched by their actions.



While 1 in 5 people believe they are already doing as much as they can to live sustainably (rising to over 1 in 4 amongst 16-24s).



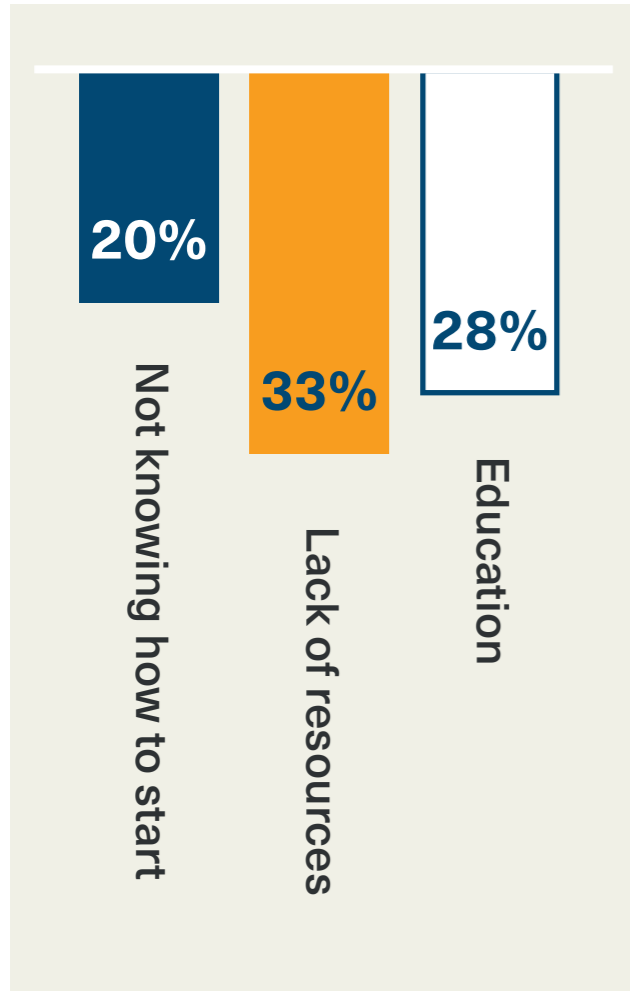
**3 in 5 people**

acknowledge that although they try, they would like to find a way to do more.

But for many consumers, barriers still exist in making sustainable choices. When it comes to brand choice, there is an expectation among them that sustainability is considered a hygiene factor in their decision making. Therefore, sustainable messaging can be dialled up to impact on the path to purchase and ultimately make it an easier choice for consumers.



The top three barriers preventing people becoming more sustainable are:



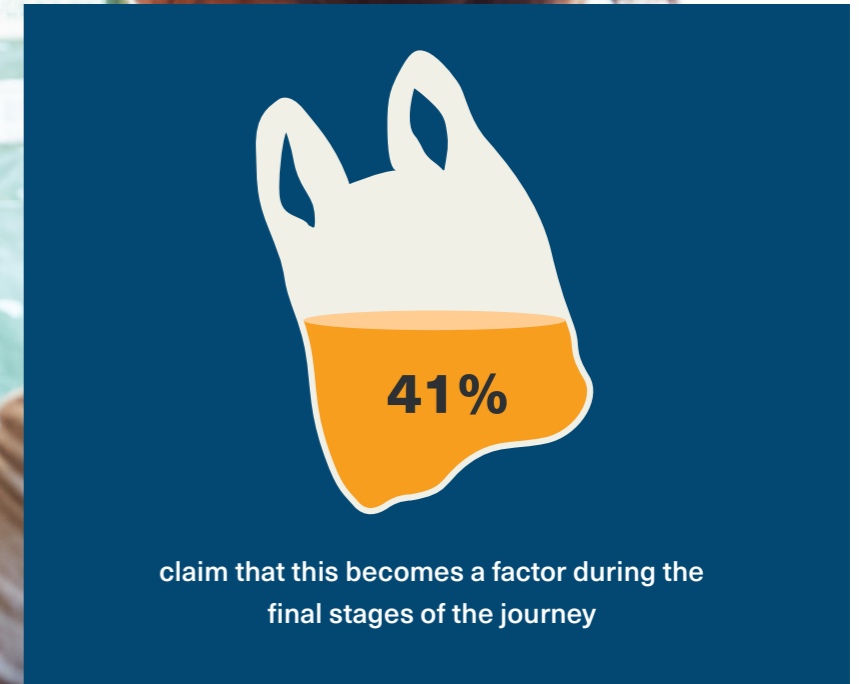
However, this is not to say that these barriers act as a deterrent as consumers are very much open to influence and education - 45% want to learn about the different ways they can live more sustainably and agree that there is a need for more education around environmental issues.

When it comes to adopting a more sustainable lifestyle, understanding the role in the path to purchase is also important.



In the last 12 months people's shopping patterns have been affected by the pandemic in all manner of ways, from panic buying to online shopping. But even with this impact, consumers are prioritising sustainability despite - or perhaps, because of - the pandemic.

According to Canvas8 "More than a third (35%) of consumers across the UK and Ireland now say that when making a purchase, a product must be naturally sourced, locally sourced, or sustainable, and 73% expect online brands to use recyclable packaging... [IO1] ". This suggests that purchasing is potentially driven more by the product when evaluating sustainability credentials than the overall brand.



Diving deeper into the purchase journey - particularly of a new brand - and at what point sustainability comes into consideration, it becomes a factor during the final stages of the consumer journey, ie once they have refined down their options. It is less likely to be a deciding factor when doing initial research/deliberating which brands to buy at the start of the journey (16%). Whilst, only 13% look at sustainability credentials once they have selected the brand they are going to buy from.



When asked what would inspire them to find out more about a new brand or consider it more favourably, a commitment to fully recyclable packaging generates the most positive metrics in consumer perceptions, followed by brands that offer products from a local rather than a global supplier.

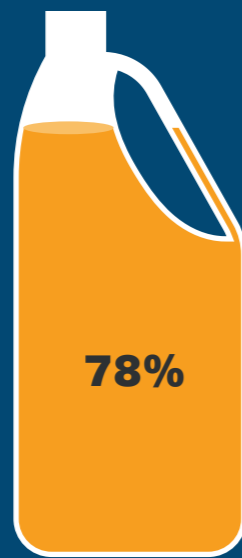


#### Impact of a brand committing to fully recyclable packing on brand engagement



75%

Brand Interest



78%

Brand Preference



71%

Purchase Intentions

There are also differences between categories regarding which elements of sustainability to dial up. Big ticket items such as automotive and travel are driven by their impact on the environment and what actions can be taken to counter it, such as carbon offsetting. The focus with smaller ticket items is on issues such as sustainable sourcing and recycling/upcycling.

But the most important elements are all tied to what is covered in communication, channels and content demonstrating how these all interconnect and ultimately impact the path to purchase.

Making it easy for consumers is about providing clear messaging, tied to the key areas of importance related to the category and sign posting at the final stages of the decision making journey.

## Implications for brands:

Taking cues from behavioural economics and nudge theory can help brands make sustainable behaviour easier for consumers:

1.

### Breakdown barriers and make it manageable:

For those that already think they do enough this can shine a light on new ways to be sustainable, and for those who feel distanced from the solution this can make it feel more in reach. With consumers paying most attention to sustainability closer to purchase when choosing between brands or products, this can take the form of simple, focused messaging on products and at POS - e.g. H&M. At this point using category heuristics (mental shortcuts, often visual or language based - e.g. green, recycling symbols) can signpost more sustainable behaviours and products for consumers, as well as validate credentials in short windows of opportunity at purchase.

2.

### Frame it for good:

Much as sustainability has become an unexpected positive by-product of pandemic lockdowns, reframing "cutting down" or "avoiding" through the positive benefits can help to interest even the least engaged consumers. Companies like Chilly Bottles have made single use plastic alternatives a coveted accessory via artist collaborations, while companies like Oddbox use positive reinforcement to heighten the impact that small behaviours have on the wider world, positioning consumers' annual CO2 and water saving reports as a bonus product from a year of veg boxes.



# A final word

**Sustainability touches a huge amount of areas, resulting in consumers often experiencing confusion and a feeling of being overwhelmed.**

This in turn leads to consumers faltering at the point of taking action despite having engagement with the subject and desire to take action.

As a brand there are three clear areas to help consumers move from intent to action: creating urgency around sustainability, keeping sustainability close to home and making the process of choosing sustainable products easy.

By taking positive action in these areas brands can help turn consumers' good intentions into deeds, clearing the path towards a sustainable future for all.



## What we did

**Global and the7stars conducted an online nationally representative survey in September 2020. The project interviewed 1,000 UK adults between the ages of 18-75.**

Please note that we have a huge amount of detail on individual categories in terms of consumers priorities when it comes to the sustainability agenda.



